

CONTRACT EXPRESS

How to

Export Documents to iManage

Overview

With Contract Express you can export generated documents to iManage as part of your drafting workflow.

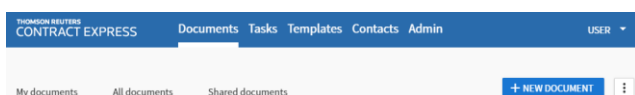
The guide outlines the steps to export documents, including selecting the export location and defining document properties, and how to work with documents after export.



Your Contract Express Administrator must configure the connection to your iManage Work instance before you can export documents to it.

1. Create a Document in Contract Express

To create a document, navigate to the **Documents** tab and click the **New Document** button.



Select your desired Template and answer all questions in the questionnaire.

Note: Documents may only be exported when they have a status of *Ready* or *Executed*. However, your Contract Express Administrator may have configured your site to permit this action for other statuses.



Documents will have a Ready status when the questionnaire is considered complete. This means all questions have been answered and there are no pending approvals.

Documents will have an Executed status after successful completion of the electronic signature process or after the document owner has uploaded a signed copy of the contract and manually marked it as executed.

2. Export to iManage

You must have Write or Full sharing permissions on the document to export documents to iManage.

Export a Contract Express Documents

The steps below outline how to export files to the same iManage folder.

Choose the export location

1. From the **Documents** tab, navigate to the Document you wish to export.
2. Click on **Export Documents** at bottom right of page.



The first time you click *Export Documents*, you will be taken to the iManage login page where you must enter valid credentials and allow the connection to Contract Express.

You will not be prompted for credentials again, unless you revoke the iManage token on your *My Account* page.

3. Enter your iManage credentials, if prompted.
4. Select the files to be exported.
5. Click the **Select Location** button.
6. Select your iManage workspace and folder.
7. Click the **Save** button.

Initiate export



Ensure you have selected export locations for all files that you need to export. The Export action can be performed only once.

Once all the files you need to export are listed in the Export files section, click the **Export** button.

| Export files | | | EXPORT |
|--------------------|------------|------------|--------|
| Name | Properties | Location | |
| NDA for John Smith | Default | > 1 folder | ⋮ |

After export, the files will be available in iManage in the folder(s) selected during export.

The screenshot shows the iManage Work interface. At the top, there is a search bar labeled 'Search Documents'. Below it are navigation tabs for 'Documents', 'Emails', 'Matters', and 'Clients'. On the left, there are filter options including 'Recent Documents' and 'Checked Out Documents'. The main area displays 'Recent Documents' with a refresh icon and a count of '32 items'. Under the 'Today' section, a document titled 'NDA for John Smith.pdf' is listed with a PDF icon.

3. Working with exported Documents in Contract Express

Once a Document has been exported to iManage, it is stored in Contract Express with a status of *Exported* and can no longer be edited.



Exported Documents can be cloned to create a new Document with the same questionnaire answers.

You can then update the questionnaire answers as needed and export the cloned Document to iManage.

View the export location of Documents

The export location is saved to the Document history in Contract Express during the export process.

To view the export location, go to the Document page and click on **History** tab. An entry with the description 'Document Exported' will exist. Expand this entry to confirm the export location.